

MEMORANDUM

3/12/2010

TO: Rick Nelson, Director, Department of Housing and Community Affairs
Jennifer Barrett, Director, Department of Finance
FROM: Chris Cihlar, CountyStat Manager
SUBJECT: Principal Residence Tax Credits

The following items were identified for follow-up during the 3/12/2010 CountyStat meeting:

1. Send data to CountyStat in order to revise slides presented in 3-12-2010 CountyStat meeting to note (1) changes not made by the state in the current LY that are made in the next LY, (2) clarification on total credit erroneously distributed.
Responsible parties: FIN
Other parties involved: CountyStat
Deadline: 3/19/2010
2. Develop a process that ensures consistent communication of SDAT's list of unverified rentals to the Department of Housing and Community Affairs (DHCA) for follow-up.
Responsible parties: FIN
Other parties involved: CountyStat, DHCA
Deadline: 4/12/2010
3. Develop a process that ensures consistent communication of rental information discovered by the Department of Finance (FIN) to DHCA for its follow-up.
Responsible parties: DHCA, FIN
Other parties involved: CountyStat
Deadline: 4/12/2010
4. Check the State Department of Assessment and Taxation's (SDAT) policy on principal residence for units rented to family.
Responsible parties: FIN
Other parties involved: CountyStat
Deadline: 3/31/2010
5. Formally request information from SDAT on the results of its principal residence validation process for Montgomery County.
Responsible parties: FIN
Other parties involved: CountyStat
Deadline: 3/31/2010

6. Compare unlicensed rentals (slide 15) for FY09 against FIN data in that year to ensure all those properties are correctly coded.

Responsible parties: none

Other parties involved: none

Deadline: 4/19/2010

cc: Timothy Firestine, Chief Administrative Officer
Fariba Kassiri, Assistant Chief Administrative Officer